SAFE HARBOR STATEMENT

Except for the historical information contained herein, the matters set forth in this presentation and the accompanying earnings release are forward-looking statements that represent our expectations, beliefs, intentions or strategies concerning future events. These forward-looking statements are subject to certain risks and uncertainties that could cause actual results to differ materially from our historical experience or our present expectations, including, but not limited to such factors as changes in economic conditions, including uncertain consumer demand; changes in market demand and pressures on the pricing for our services; changes in the availability of equipment and services from third party providers, including the availability of contracted truckload carriers and changes in prices; changes in political and governmental conditions domestically and internationally; catastrophic events such as environmental events or terrorist attacks; failure to retain employees; failure of any of our technology or operating systems, including due to data security breaches or hacking; competition and growth rates within the third party logistics industry; risks associated with our decentralized operations; seasonality in the transportation industry; risks associated with litigation and insurance coverage; risks associated with operations outside of the U.S.; risks associated with the produce industry, including food safety and contamination issues; fuel prices and availability; risk of unexpected or unanticipated events or opportunities that might require additional capital expenditures; our dependence on our largest customers; risks associated with identifying suitable acquisitions and investments and with integrating acquired companies; risks associated with our long-term growth and profitability; and other risks and uncertainties detailed in our Annual and Quarterly Reports.
GLOBAL MULTIMODAL, MULTISERVICE PROVIDER

• 115 year history of accelerating commerce
• Connecting over 200,000 customers and carriers around the globe
• North America’s largest 3PL
• Unmatched experience and scale
Based on 2018 net revenues

WE DELIVER AN AVERAGE OF **OVER 3 SERVICES PER TOP 500 CUSTOMER**
WE COMPETE IN A GROWING INDUSTRY

**U.S. 3PL BROKERAGE MARKET FORECAST**

10% 2018-2022 CAGR

(IN BILLIONS)

<table>
<thead>
<tr>
<th>Year</th>
<th>2018E</th>
<th>2019E</th>
<th>2020E</th>
<th>2021E</th>
<th>2022E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$80</td>
<td>$88</td>
<td>$97</td>
<td>$107</td>
<td>$118</td>
</tr>
</tbody>
</table>

Source: Armstrong & Associates

**GLOBAL OCEAN FREIGHT MARKET FORECAST**

4% 2018-2022 CAGR

(IN MILLION TEUs)

<table>
<thead>
<tr>
<th>Year</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
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<td></td>
<td>67</td>
<td>69</td>
<td>72</td>
<td>75</td>
<td>79</td>
</tr>
</tbody>
</table>

Source: Technavio

**GLOBAL AIR FREIGHT MARKET FORECAST**

4% 2018-2022 CAGR

(IN MILLION TONNES)

<table>
<thead>
<tr>
<th>Year</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
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<td>31</td>
<td>32</td>
<td>34</td>
<td>35</td>
<td>37</td>
</tr>
</tbody>
</table>

Source: Technavio
FREIGHT BROKERAGE MODEL IS INCREASINGLY RELEVANT

U.S. FREIGHT BROKERAGE PENETRATION OF TOTAL FREIGHT MARKET

Source: Armstrong & Associates
SIZE AND SCALE MATTER

LARGEST NORTH AMERICA FREIGHT BROKERS BY ESTIMATED NET REVENUES

2018
(IN BILLIONS)

$1,525

$521

$395

$339

$330

$305

$300

$180

$164

$151

Source: Transport Topics
### Diversified Portfolio of Customers

124K+ Customers Across the Globe

<table>
<thead>
<tr>
<th>Customer Size Segmentation</th>
<th>Customer Count</th>
<th>% of Net Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>0.6%</td>
<td>26.2%</td>
</tr>
<tr>
<td>Large</td>
<td>2.2%</td>
<td>23.7%</td>
</tr>
<tr>
<td>Medium</td>
<td>5.9%</td>
<td>18.9%</td>
</tr>
<tr>
<td>Small</td>
<td>91.3%</td>
<td>31.2%</td>
</tr>
</tbody>
</table>

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- 48% of net revenues
- 100% retention in 2018
- 90% 10+ years with C.H. Robinson

% of 2018 net revenues
A GLOBAL, DIVERSE CARRIER BASE – AGGREGATING A FRAGMENTED MARKET

8% LARGE CARRIERS >400 TRUCKS

9% MEDIUM CARRIERS 100-400 TRUCKS

83% SMALL CARRIERS <100 TRUCKS

PERCENTAGE OF 2018 TRUCKLOAD SHIPMENTS BY CARRIER SIZE

76K ACTIVE CARRIERS AND SUPPLIERS IN 2018

CAPACITY RELATIONSHIPS WITH OVER 100 LTL CARRIERS

EXTENSIVE INTERMODAL COVERAGE WITH DIRECT ACCESS TO ALL CLASS 1 NORTH AMERICAN RAILROADS

TOP 5 NVOCC WITHIN THE GLOBAL OCEAN CARRIER PORTFOLIO

20 CORE AIR CARRIERS MOVE 73% OF OUR VOLUME

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VOLUME GROWTH OVER TIME

NORTH AMERICA
VOLUME GROWTH
2010-2018 CAGR

+4% TRUCKLOAD

+13% LTL

GLOBAL
VOLUME GROWTH
2013-2018 CAGR

+10% OCEAN

+15% AIR
MAINTAIN MARGIN THROUGH THE FREIGHT CYCLE

NORTH AMERICA TRUCKLOAD PRICE AND COST YOY % CHANGE (1), TRANSPORTATION NET REVENUE MARGIN

(1) YoY change in cost and price exclude the estimated impact of fuel.
MAINTAIN MARGIN THROUGH THE FREIGHT CYCLE

NORTH AMERICA TRUCKLOAD PRICE AND COST PER MILE

(1) Cost and price per mile exclude the estimated impact of fuel.
NAVISPHERE®

OUR GLOBAL MULTIMODAL PLATFORM

CONNECTS 200K CUSTOMERS AND CARRIERS, DELIVERING REAL TIME INSIGHTS AND VISIBILITY
MEETING OUR CUSTOMERS & CARRIERS WHERE THEY WANT TO BUY

MOST CONNECTED, EASIEST TO ACCESS: USE OUR PLATFORM OR CONNECT VIA OTHERS

75% OF SHIPMENTS ARE TENDERED TO US ELECTRONICALLY

50% OF SHIPMENTS POWERED BY NAVISPHERE ARE FULLY AUTOMATED

650M DIGITAL INTERACTIONS ANNUALLY
OUR INFORMATION ADVANTAGE CREATES BETTER OUTCOMES

EXPERIENCE
• 115 years of accelerating commerce
• Multimodal
• Across all industries
• Across all customer segments

SCALE
• 124K customers, 76K carriers
• 650M digital interactions annually
• 18M shipments annually
• 1.5M quote requests per day

DELIVERS AN INFORMATION ADVANTAGE

Creating better outcomes for customers, carriers, and employees
OUR RESULTS

NET REVENUES
7.0% 10-YEAR CAGR
(IN MILLIONS)

$2,705

DILUTED EPS FROM CONTINUING OPERATIONS (1)
8.6% 10-YEAR CAGR

$4.73

C.H. ROBINSON

HAS RETURNED OVER $5 BILLION TO SHAREHOLDERS IN THE LAST 10 YEARS (2)

DIVIDEND PER SHARE
7.6%
10-YEAR CAGR

(1) Adjusted results excluding Non-Recurring Transaction Impacts related to the acquisition of Phoenix International Freight Services LTD. and Apreo Logistics S.A. and the divestiture of T-Chek Systems Inc. Includes a $500 million accelerated share repurchase.

(2)
WHAT YOU SHOULD EXPECT

1. Continued focus on taking market share
2. Automation of core processes
3. Improved operating leverage

C.H. ROBINSON